Assessment Guide: New Client Setup 2-Customization

1. Production and Financial Groups are displayed on which report?
   - ☐ A. Monthly Production Summary
   - ☐ B. Accounts Receivable Variance
   - ☐ C. Daily Transaction Audit
   - ☐ D. Cancellations and No Shows

2. Marketing Groups and Categories:
   - ☐ A. Are pre-loaded in OfficeMate.
   - ☐ B. Are a great way to market to patients through Internal Marketing.
   - ☐ C. Can help increase sales.
   - ☐ D. All of the above.

3. List Box Selections:
   - ☐ A. Can't be customized.
   - ☐ B. Can't be added to by pressing the F12 key.
   - ☐ C. Are where you set up Zip Codes.
   - ☐ D. Are not pre-loaded in OfficeMate.

4. The Recall tab:
   - ☐ A. Allows recall types and mailing schedules to be created.
   - ☐ B. Has a 12 month adult recall preloaded.
   - ☐ C. Allows recall types to be edited.
   - ☐ D. All of the above.

5. Zip Code short cuts:
   - ☐ A. Can't be customized.
   - ☐ B. Can be used if a city is not defaulted in the list box.
   - ☐ C. Are pre-loaded in OfficeMate.
   - ☐ D. Don't save you any time.

6. Procedure Codes:
   - ☐ A. Are pre-loaded in OfficeMate.
   - ☐ B. Can be added to in OfficeMate.
   - ☐ C. Can be added to a Quick List.
   - ☐ D. All of the above.

Answer Key 1-A, 2-D, 3-C, 4-D, 5-B, 6-D